

Class No.	Staff
Original Date:	
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Pay Group:	24

CLASS SPECIFICATION

FINANCIAL AID & AWARDS ADVISOR

NATURE AND SCOPE OF WORK:

The incumbent is primarily responsible for the administration of Student Financial Aid and Awards programs at the University based on established criteria set by the University and/or the Federal and Provincial Governments. The incumbent recommends and implements procedures and policies, and advises, interviews and assists students on all aspects of educational financial resources, including the application and appeals processes for government aid, and for the dispensation of University trust funds. This position is seen as a key resource in student retention and financial literacy success and acts as a transitional guide for students and external stakeholders in navigating students' financial aid options which includes participating in orientation and other recruitment events, developing and presenting financial aid workshops. The incumbent receives direction from the Supervisor, Financial Aid and Awards and reports to the Associate Registrar, Student Information Services & Records and Financial Aid & Awards.

ILLUSTRATIVE EXAMPLE OF DUTIES:

- Remains updated and current in policies and procedures (both internal and external) as they pertain to student financial assistance.
- Advises students regarding various financial assistance options; provides information and resources to students and assists in completing the appropriate forms.
- Interviews students and assesses their financial status as identified by the interview and application documents; refers students when appropriate, to other services within the University (e.g. Counselling, Academic Advising, Accessibility Services, Student Affairs, Indigenous Student Services, Financial Services, Upgrading, Athletics, etc.).
- Administers a variety of University student financial assistance programming, including coordinating and communicating information to departments pertaining to the awards processing, preparing nomination forms and applicant lists; reviewing and verifying department selections to ensure recipients meet award eligibility requirements.
- Determining eligibility, assessing and evaluating bursary, scholarship and award

applications while applying established criteria, guidelines or procedures; administering student award audits including and verifying confidential and sensitive documents (e.g. bank statements, birth certificates, tax information, etc.

- Recommends approval for distribution of such funds to the Supervisor and/or the Associate Registrar; posting awards and preparing cheque requisitions.
- Under the guidance of the Supervisor, reviews and monitors department programs currently eligible for student loan funding on an ongoing basis to ensure continued compliance with Ministry guidelines; reviews new programs approved by Senate to determine their eligibility for funding and provides recommendations to the Supervisor on final approval.
- Coordinates and reviews information submitted by departments to determine eligible program costs for student loan funding.
- Administers government student financial assistance programming and private U.S. student loans.
- Assists in the development, amendment, documentation and implementation of policies and procedures for the department in accordance with policies and procedures for the administration of all financial aid and awards programs available through the University.
- With the guidance of the Supervisor, establishes and implements procedures and processes on the administration of all aspects of government funded, University administered student financial assistance programs to ensure programs are accessed by eligible students. Coordinates the workflow and administers all aspects of these special financial aid programs (e.g. data input, communications to students, internal reporting) as it pertains to these programs.
- Reviews, checks work and provides training and guidance to Registrar's Office staff, including the Student Information Services Officers and other Financial Aid Advisors as required.
- Maintains departmental records, the financial aid databases, and the integrity and confidentiality of sensitive information and systems.
- Records, updates, and maintains student financial assistance information in the applicable government and university information systems.
- Communicates with government agencies in order to assist with the resolution of student loan appeals as required.
- Under the guidance of the Supervisor, liaises with the Office of Development & Alumni Relations in relation to awards funds and processing.
- With the guidance of the Supervisor, develops, implements and delivers information sessions for external community relations (e.g. general community presentations, presentations for high schools, parents, counsellors etc.) and the University community (students, staff, and faculty); prepares presentations and supporting information or promotional materials.
- Develops and implements methods to continuously promote awards, bursaries and scholarships (both internal and external) to students and departments.
- Provides student financial assistance information and advice in individual and group sessions both on and off campus, including all regional Capilano University campuses.
- Prepares, updates and/or produces a variety of material from general instruction including correspondence, spreadsheets, presentations, newsletters, notices and reports;

supports communication to students, the university community and external stakeholders.

- Responsible for the content management of the student financial assistance web site and University Intranet (Frontlines). Reviews, amends and updates both sites on an on-going basis in coordination with the Financial Aid Advisors and Supervisor. Reviews and evaluates the Financial Aid and Awards website to ensure its functionality and user friendliness; researches other websites for ideas, information, best practices, etc., which can be incorporated.
- May be required to take training and act in the capacity of a floor warden as part of the University's Emergency Preparedness Plan (Fire, W.H.M.I.S, Earthquake).
- Works with the Supervisor to develop procedures for the distribution of emergency funding (loans and bursaries) including Indigenous emergency funding. Interviews and assesses students while exercising cultural sensitivity and tact including referrals from Indigenous Student Services to determine eligibility, assessment, evaluation, and distribution of emergency funding. Recommends approval of the distribution of such funds to the Supervisor and administers the University's policies and procedures as relevant regarding student emergency and complex financial situations.
- Administers the fee deferral process based on existing policies and establishes procedures in conjunction with the Associate Registrar and Financial Services.
- Assists to ensure all activities of the office comply with procedures and regulations; communicates, reports and is accountable to government funding agencies.
- Participates in the testing and implementation of new systems or upgrades used by the Registrar's Office.
- Uses appointment booking software and online systems (portals, etc.) and services to provide appropriate service, information and advice to students.
- Provides back-up support for all positions within Financial Aid and Awards (for other FAOs while on vacation, sick, on leave etc.)
- Acts as a University representative when advising students and external stakeholders on student financial assistance programs through a variety of means including in person, one-on-one meetings, group session presentations and any other available option.
- Attends and speaks at various university events as part of targeted recruitment activities as well as events for current students.
- Under the guidance of the Supervisor, recommends and introduces process and procedure improvements across internal team and other department functions.
- Interviews and assists students in the application and appeals processes for government student financial assistance and for the dispensation of University trust funds.
- Provides information, in both verbal and written form, regarding government student financial assistance policies and procedures and University policies, procedures, and other resources related to the Registrar's Office.
- Attends on-campus and external meetings and conferences to stay current on new policies, procedures and programs.
- Performs duties related to the requirements and qualifications of the position.

REQUIRED KNOWLEDGE, ABILITIES AND SKILLS:

- Thorough knowledge of student financial assistance sources, availability, policies and procedures.
- Thorough knowledge of the rules and regulations governing the various awards, bursaries and scholarships administered by the University.
- Thorough knowledge of moderate standard of living costs, as well as program fee structures, textbook and other student costs.
- Thorough knowledge of spreadsheet applications, word processing and presentation software.
- Thorough knowledge of subjective interviewing and advising techniques.
- Considerable knowledge of database applications.
- Thorough knowledge of the application of Freedom of Information and Protection of Privacy provisions to the operations of the department.
- Thorough knowledge of business English, spelling, and arithmetic.
- Thorough knowledge of office practices and procedures.
- Ability to interview and assist students with various student financial assistance needs and options.
- Ability to maintain confidentiality and to exercise tact, diplomacy, discretion and sensitivity in directing applicants for student financial assistance and when working with other employees, students, community groups, and the general public.
- Ability to understand the context of issues in order to exercise initiative and judgment regarding action required.
- Ability to take responsibility for completion and follow through of goals and tasks.
- Ability to adapt to changing situations and reprioritize tasks smoothly.
- Ability to effectively communicate accurate information on a one-to-one basis or to groups of a varying size and to address large or small groups in formal or informal settings.
- Ability to organize and conduct workshops and open lab sessions.
- Ability to carry out research assignments and organize information obtained from a variety of sources.
- Ability to multitask, apply organizational skills in order to meet deadlines, and work with minimal supervision.
- Ability to establish and maintain effective working relationships with other employees, students, officials, community groups, and the general public.
- Ability to provide a high level of customer service, to handle user complaints and suggestions, and to resolve conflicts.
- Ability to understand and follow complex oral and written instructions, and communicate information effectively, both orally and in writing.
- Ability to prepare correspondence and reports appropriate to the intended audience with correct emphasis and tone.
- Ability to learn in-house and other software applications and to apply technical knowledge.

- Ability to be detail-oriented and to keep accurate records and archives.
- Ability to assess and evaluate applications for financial aid using established criteria, make decisions regarding the applications, and communicate the decisions with tact and sensitivity.
- Ability to respond to sensitive problems with tact.
- Ability to maintain confidentiality.
- Ability to work independently within established guidelines.
- Ability to communicate in a clear, concise manner in both verbal and written form, and to understand complex verbal and written information.
- Ability to upgrade computer skills when necessary.

REQUIRED TRAINING AND EXPERIENCE:

- Completion of a bachelor's degree in a related discipline.
- Two years of related experience, including experience in an educational setting, and experience in financial aid application assessment, in interpreting and applying policy and procedures, and with significant student contact. Experience must include delivering presentations and conducting one-on-one advising meetings.

REQUIRED LICENCES, CERTIFICATES AND REGISTRATIONS:

None.